



Navigating the Higher Education CIO's **First 100 Days**

Part of the CIO Leadership Series

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Our Work in Higher Education: The Education Advisory Board

Encouraged by leaders of academic medical centers that our model and experience serving nonprofit institutions might prove valuable to colleges and universities, The Advisory Board Company launched The Education Advisory Board, our higher education practice, in 2007. We are honored to serve over 800 college and university executives through our EAB memberships.



Research and Insights

Academic Affairs Forum

Strategic advice for provosts to elevate performance in teaching, research, and academic governance

Student Affairs Forum

Research helping student affairs improve student engagement and perfect the student experience

Continuing and Online Education Forum

Research on continuing and online education program growth, revenues, and academic quality

Enrollment Management Forum

Guidance and support for chief enrollment officers to overcome today's enrollment challenges

Business Affairs Forum

Research and support helping CBOs improve administrative efficiency and lower costs

Community College Executive Forum

Strategic advice for community college leaders on strengthening student success, workforce development, and institutional planning

IT Forum

Research for CIOs on leveraging information and technology to further higher education

Advancement Forum

Research and performance analytics for development officers to elevate fundraising performance



Performance Technologies

University Spend Collaborative

Business intelligence and price benchmarking to help institutions better manage procurement and outside spend

University Student Success Collaborative

Predictive modeling and academic milestone tracking to help universities improve completion and time to degree

Community College Student Success Collaborative

Student support tool for college navigation and career pathing to help colleges improve graduation and employment outcomes

Advisors to Our Work

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Additional Resources for New IT Leaders

2014 Study of the Higher Education Chief Information Officer Roles and Responsibilities
Wayne Brown, Ph.D.
Center for Higher Education Chief Information Officer Studies, Inc.
www.checs.org

Five Questions for CIOs
Eric Denna
EDUCAUSE Review, January 2014
<https://net.educause.edu/ir/library/pdf/ERM1419.pdf>

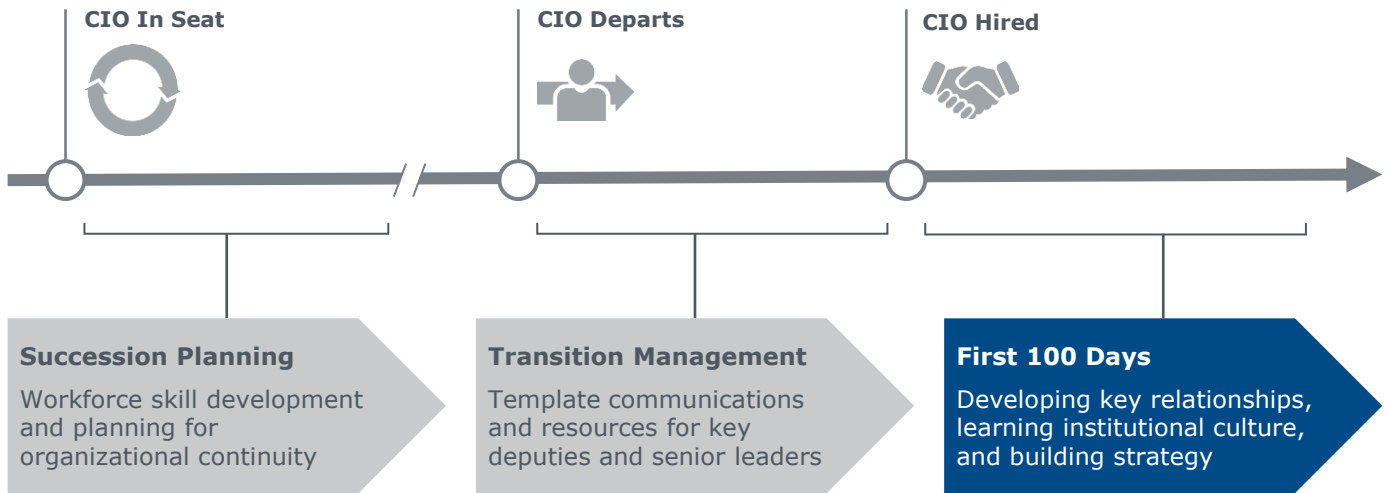
Pepperdine University CIO First 100-Day Memo
Jonathan See, CIO
April 2012
<https://sites.google.com/a/pepperdine.edu/pepperdine-senior-it-leadership/members/jonathan-see>

The CIO's First 100 Days Series
Peter High
Metis Strategy (Series available through www.Forbes.com)
<http://www.metisstrategy.com/the-cios-first-100-days-series-summary-in-forbes/>

The First 90 Days: Critical Success Strategies for New Leaders at All Levels
Michael Watkins (Book)
Harvard Business Press, 2003

The Realities of a New Senior-Level IT Position
John Bucher, Barbara Horgan, Thomas Moberg, Robert Paterson, and H. David Todd
EDUCAUSE Quarterly, 2001
<http://net.educause.edu/ir/library/pdf/eqm0123.pdf>

IT Forum CIO Leadership Series



Resources:

- *Whitepaper*
- *Implementation Aids*

Resources:

- *Supervisor Guidance for Outgoing and Incoming CIOs*

Resources:

- *Whitepaper*
- *Implementation Aids*

Additional IT Leadership Resources



Additional IT leadership resources, covering succession planning, transition management, and first 100 days can be found on the IT Forum's CIO Leadership Resources Insight Center.

To learn more, visit: eab.com/itf/cioleadership

Roadmap

1 The First 100 Day Challenge in Higher Ed

2 Navigating A New Campus

3 Building The Foundation for Success

4 Appendix

Contents

<i>Longer CIO Tenure Increases Urgency of First 100 Days</i>	Page 6
<i>Academic Culture Challenging for New IT Leaders</i>	Page 7
<i>CIO and Role Background Segments Strategy</i>	Page 8
<i>Setting the Stage for A Successful Tenure</i>	Page 9

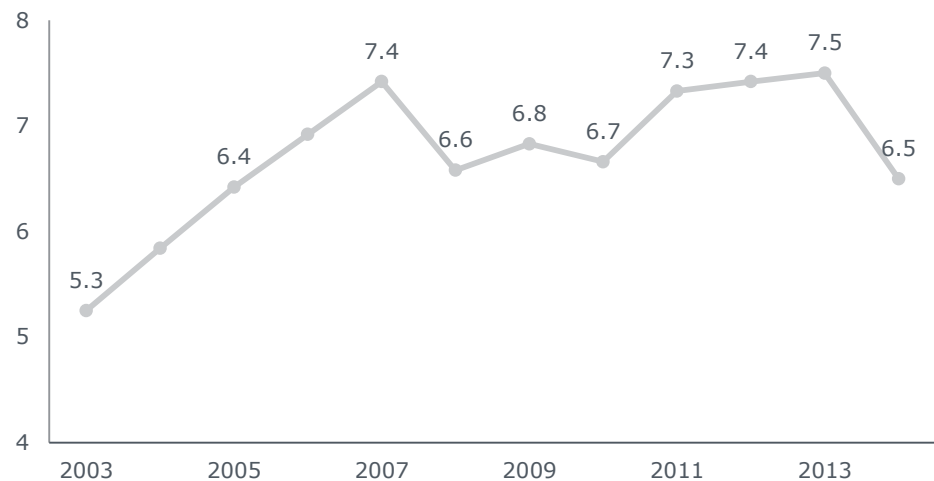
Longer CIO Tenure Increases Urgency of First 100 Days

Despite the common narrative that the Chief Information Officer has a shorter tenure than other members of the institutional leadership team, longitudinal study of the CIO role shows that average tenure has increased each year for most of the past decade. Today, the average CIO tenure in higher education measured through the annual CHECS survey* is six years and six months, more than one year above the average in 2003.

Challenges to traditional revenue sources and demands for new outcomes reporting, huge investments in new enterprise systems and analytics tools, and the inclusion of IT direction in institutional planning elevate the strategic importance of the CIO. According to industry experts and executive transition consultants, the elevated position of IT in institutional planning requires a more strategic IT leader; this increases the urgency and difficulty of effectively navigating the first 100 days in office.

More CIO Influence Elevates Transition Importance

Average Tenure in Years of Higher Education CIOs*



Elevated Role for IT Requires More Strategic CIOs



New Challenges Necessitate New Data

Declining revenue and increasing competition create demand for more reporting and outcomes data



Fast-Growing Investments in Tech and Staff

Heavy investments in new student enablement, BI, and analytics tools raise the IT leadership stakes



More IT Influence in Setting Strategy

More CIOs are part of the President's cabinet- and more institutions are including IT in strategic plans



More Pressure to Get It Right

"If anything, the increasing importance, span of control, and influence of the strategic CIO make the recruitment of the CIO and his or her first 100 days even more crucial; these changes increase the urgency to get it right."

*Mark Polansky, Senior Partner
Korn Ferry International*

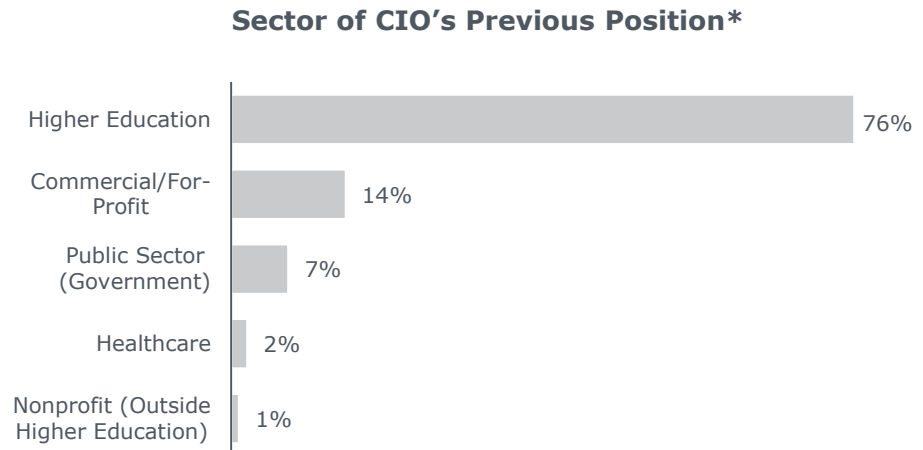
*Wayne Brown, Ph.D., 2014 Study of the Higher Education Chief Information Officer Roles and Responsibilities, Center for Higher Education Chief Information Officer Studies, Inc. www.checs.org

Academic Culture Challenging for New IT Leaders

Entering a new executive role is a challenge in any industry, but in higher education, where a decentralized organizational culture meets a broad range of IT capabilities and perspectives, new CIOs face a unique set of challenges.

Even for the three-quarters of higher education CIOs that enter the position from within higher education, the diverse, shared governance landscape of colleges and universities necessitates a significant investment of time and energy. In the first 100 days of a new leader's tenure, this means many more conversations and meetings than might be required in other industries, because many academic and administrative leaders in higher education still see IT primarily as a cost center, rather than a business enabler.

One-Quarter of Surveyed CIOs New to Higher Education



A Uniquely Decentralized Environment

The shared governance model is at the core of academic culture and critical to the mission of higher education. New IT leaders entering the higher education space must contend with the demands of more partners, wielding more influence, than in any other industry.



Broad Range of IT Knowledge and Capability

End-users in higher education fill the spectrum of IT knowledge, from high-powered innovators in computer and physical sciences to those largely divorced from modern technology. The IT function needs to communicate with, educate, and enable a complex, diverse set of constituents.



Leaders Might Not See IT As Enabler, Partner

Experts in academic disciplines, and even administrative leaders, might only expect IT to continue providing basic services. Constituents may have difficulty imagining the ways that new technology and tools can further the departmental and institutional missions.

*Wayne Brown, Ph.D., 2014 Study of the Higher Education Chief Information Officer Roles and Responsibilities, Center for Higher Education Chief Information Officer Studies, Inc. www.checs.org

CIO Background Determines First 100 Day Challenges

New CIOs face different challenges depending on their experience with the role, their familiarity with higher education administration, their history at the institution, and whether they are filling the role in an interim capacity.

In addition, a role that did not have a planned transition (i.e., the previous CIO left without succession planning or the CIO role is new to the institution) will require more conversations with executives, managers, and end-users than a carefully-managed succession and transition.

For tactics and tools to develop CIO succession planning at your own institution, please see *Ingraining Succession Planning in Higher Education IT*, the first entry in our CIO Leadership Series.

Internal, External Candidates Face Different Challenges

The Insider

*New CIO,
From Higher Education,
Familiar Institution*

Key Challenges

- Understand new responsibilities
- Adjust relationships with colleagues

The Neophyte

*New CIO,
From Outside Higher Education,
New Institution*

Key Challenges

- Understand new responsibilities
- Build support among a new team
- Expand knowledge of higher education landscape
- Rapidly identify the institution's challenges and opportunities

The Veteran

*Experienced CIO,
From Higher Education,
New Institution*

Key Challenges

- Build support among a new team
- Rapidly identify the institution's challenges and opportunities
- Create a workable plan to effect change

The Newcomer

*New CIO,
From Higher Education,
New Institution*

Key Challenges

- Understand new responsibilities
- Build support among a new team
- Rapidly identify the institution's challenges and opportunities

The Outsider

*Experienced CIO,
From Outside Higher Education,
New Institution*

Key Challenges

- Build support among a new team
- Expand knowledge of higher education landscape
- Rapidly identify the institution's challenges and opportunities
- Create a workable plan to effect change

The Placeholder

*Interim CIO
(may or may not be a candidate)*

Key Challenges

- Maintain the focus and morale of the IT team
- Continue to make progress on long-standing initiatives
- Respond quickly and decisively to crises

Setting the Stage for A Successful Tenure

Helping our institutions succeed in an era of reduced funding, increased pressure on outcomes, and intense scrutiny about prices requires that IT take on a more strategic role, but driving change in higher education requires more constituent buy-in and organizational allies than almost any other industry. The CIO's ability to make change, influence policy, and enable the next generation of great faculty and students is determined by the strength of her relationships across campus and ability to communicate that vision to a diverse and complex group of stakeholders.

The first 100 days is the CIO's best chance to learn institutional culture and forge relationships with campus leaders. These early days are not a guarantor of long-term success, but effectively negotiating the first 100 days is the best way to launch a tenure that enables institution-wide progress.

Build Relationship Foundation for the Long-Term



Build Institutional and Industry Knowledge

To find buy-in among end-users and leaders, the CIO needs to learn the language and culture of a complex, diverse industry; the conversations and meetings that happen in the first 100 days are the perfect time to begin the process.



Understand the Shared Governance Model

The CIO needs partners and champions across campus to support progress; use early, personal conversations to build knowledge about the power structures, data-sharing, and mechanics of governance partnerships.



Develop Relationships with Key Partners

Use the 'fresh start' to build relationships with the organizational leaders, heavy IT users, and academic "influencers" that can help the new CIO earn buy-in and support across campus.



Prepare to Create Long-Term Strategy

Codify institutional knowledge as well as the goals of leaders and end-users in a 100 Day Memo, a clear statement of purpose and affirmation of IT's alignment with campus-wide priorities.



Worth the Attention

"A lot comes up in your first hundred days, and it can be easy to get distracted. But if you can really take the time to get to know people across campus and plug in to the existing administration and culture, it makes an enormous difference down the line... when you are starting new projects."

*Viji Murali, CIO
University of California-Davis*

Roadmap

1 The First 100 Day Challenge in Higher Ed

2 Navigating A New Campus

3 Building The Foundation for Success

4 Appendix

Contents

<i>Making the Right Entrance</i>	Page 11
<i>Planning Stops On the Listening Tour</i>	Page 12
<i>Making the Most of Early Conversations</i>	Page 13
<i>Communication That Counts</i>	Page 14

Making the Right Entrance

During the search, interview, and preparation before the first work day, the CIO should build as much institutional and industry knowledge as possible. To devote the maximum time and resources to building relationships and learning about deep campus issues, take time before the first day to become familiar with strategic plans and local trends, the jargon and trade press of higher education IT, and the higher-level publications, data sources, and thought leaders that will be familiar to provosts, deans, and administrative leaders.

See Appendix for a Higher Education Primer

- Checklist of resources and tasks that a new CIO should begin to collect before their first day at an institution
- Page 24-27

What the CIO Should Know Before Day One

Institution Knowledge

Institution Background

- Read the institution-wide strategic plan or president's agenda (and any college- or function-specific plans) which are available online.
- How have enrollment, tuition price/discounting, research activity, and costs changed in the last five to ten years?

Higher Education IT Basics

- Read high-level industry reviews (e.g., the Annual EDUCAUSE Top 10 Issues) and subscribe to trade press sources (e.g., CampusTechnology, EdDive) to start learning about trends and common vocabulary.
- Learn about the ERP, CRM, and SIS systems in place at the institution; guides to the most common systems (e.g., Banner, PeopleSoft) are freely available online.

Industry Knowledge

Higher Education Resources and Publications

- Subscribe to the publications that are popular among academic and administrative leaders (e.g., Inside Higher Ed, the Chronicle of Higher Education) for regular reading and breaking news alerts.
- Take time to study state/provincial and national sources of benchmarking data, and familiarize yourself with what kinds of data are publicly available.
- If possible, get early access to publications from affiliated organizations and research groups (e.g., NACUBO, National Student Clearinghouse, EAB) to learn about industry-wide trends and challenges.

Planning Stops On the Listening Tour

The CIO's introduction to campus after hiring begins with a 'listening tour,' or series of conversations and meetings with leadership and constituents, to be introduced to new colleagues and begin building relationships. This process begins with the high-ranking academic and administrative leaders that can be identified from their position on the organizational chart (e.g., IMT, Cabinet, Academic Deans). It continues with units and staff with important IT connections; some of these could be clear at the outset (e.g., Enrollment Management is a common area of intense IT investment), but others could require more research (e.g., long-serving staff in finance and administration with unique systems knowledge).

During conversations with leaders and IT connections, the new CIO should ask about "influencers"; faculty and staff who, through academic achievements, tenure, or institutional knowledge, have a high degree of influence over other campus constituents.

Listening Tour Checklist

- Campus groups which the new CIO should include in their listening tour
- Page 28

Contact Leaders and IT Partners On the Way to Influencers



Meet with Institution Organization Leaders...

The formal leadership team members that the new CIO needs to build early relationships with includes:

- Members of the institutional management team (IMT) or Cabinet
- Sub-cabinet academic leaders (e.g., Deans, Faculty Senate)
- Directors of major divisions (e.g., Facilities, Student Affairs)



... And Identify Key IT Connections

Ask formal leadership and the IT team to identify units with key IT connections. Departments that often have a close relationship with the IT team include those with:

- Some parallel tasks (e.g., Institutional Research)
- High technology utilization (e.g., Enrollment Management, Advancement and Alumni Affairs, academic 'power users')
- Academic areas with advanced technology practitioners (e.g., Departments of Engineering and Computer Science)



To Discover Campus "Influencers"

In every higher education institution, there are academic faculty and staff members whose influence over other faculty and administrative leaders is higher than the organizational chart suggests.

In most cases, these faculty members will have achieved outstanding credentials or accolades in their field (e.g., Nobel laureates, membership in national and international groups, high-profile and very large grant awards).

Administrative 'influencers' are often staff with long tenure at the institution, deep personal relationships across campus, or unique knowledge about the data and systems on campus.

Getting to Know You

Most institutions have business processes and initiatives that could benefit from more effective technology usage; however, the task of the new CIO is not to teach constituents how to fix perceived gaps, but to learn about the root causes and incentives that lie beneath surface-level problems. CIOs warn that trying to change campus without first learning the complexities of internal culture and barriers to change will have the opposite effect; the new CIO will quickly lose the ability to influence leaders and end-users.

Learn, Don't Teach in Early Meetings

Avoid A Critical Mistake...

"It's a mistake I see a lot; someone comes into an institution, believes they have the answers to everyone's problems, and spend the first 100 days to get action plans in place. If you don't respect the culture and the need to listen and learn, you can marginalize yourself very quickly."

*Eric Denna, CIO
University of Maryland*

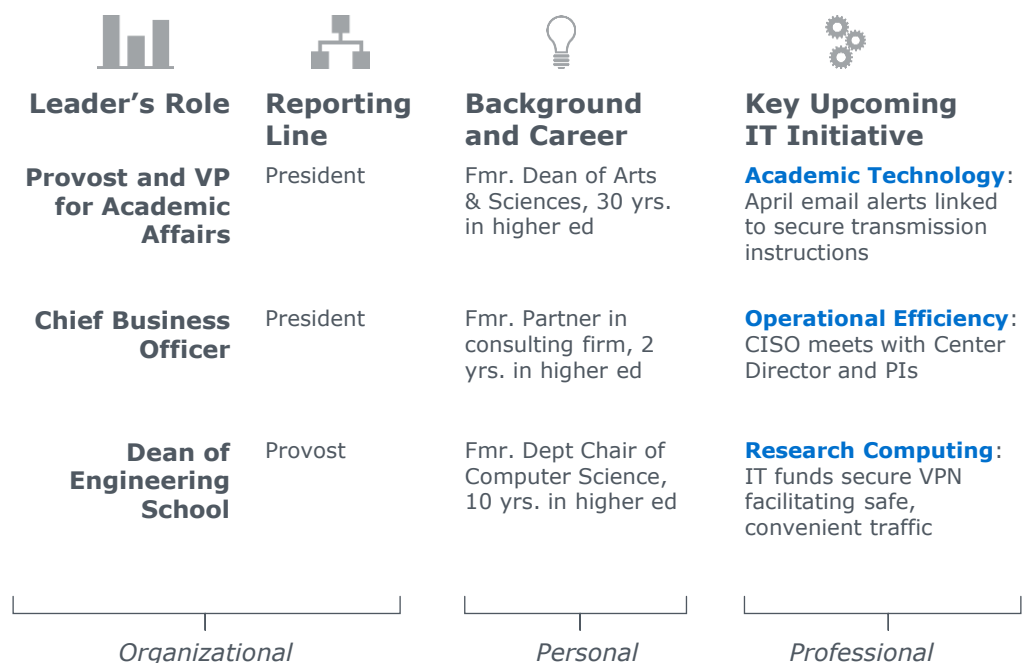
... Find Root Causes First

"When leaders tell you about their technology challenges, you'll need to do more research, because what they struggle with are just symptoms of the core challenges you need to address. After you learn what those core challenges are, then you need to figure out if they're fixable; all of that takes time and listening."

*Wes Kahle, Founder
Kahle Partners*

Before meeting with institutional executives and local leaders (e.g., academic Deans, faculty senate leaders, Associate Vice Presidents) learn some of the details that inform the services and strategies that IT can develop with partners. An administrative assistant or junior member of the IT team can put together this information on behalf of a new CIO; the goal is to facilitate a productive conversation by focusing the CIO on the highest-profile, strategic initiatives within a department.

Lightweight Preparation Goes A Long Way



Communication That Counts

Early conversations with academic and administrative leaders should focus on local missions and goals; technology and services should only be discussed after the new CIO understands how the department wants to operate and advance in the coming years.

At the **University of Maryland at College Park**, the CIO divides a set of initial questions into two categories; direction (making sure IT is doing the right things) and execution (making sure that IT is doing things right). In addition to asking these questions to department leaders, the CIO leaves a copy of the “Five Questions” with Deans and other leaders, to encourage further discussion at the unit level.

“Five Questions” Drop Sheet

- Printable version of the “Five Questions” to leave with academic leaders
- Page 29

Key Questions to Ask During The Listening Tour

Direction Questions

- 1** *What Is Your Department’s Mission?*
 - What is the department trying to accomplish in the next three years? How will the department be different in three years than it is today?
 - What are the major focuses of your researchers and staff in the next three years?
- 2** *How Does Your Team Work with IT?*
 - What are ways in which your staff and constituents use technology?
 - Are there new and innovative ways in which your team wants to use technology that we can discuss?

Execution Questions

- 3** *What Does A Successful Relationship Look Like?*
 - If IT meets all your expectations in the coming year, what will you be able to achieve that you couldn’t last year?
 - How will our team know that we are doing a good job?
- 4** *How Does IT Provide Services to Your Team?*
 - In the past, how have you worked with central IT to achieve your goals? Were you satisfied with those services?
 - What would you change about IT’s services, if you could?
- 5** *How Does IT Organize Service Delivery?*
 - What are the most cost-effective ways for IT to organize staff and resources in a way that allows for high-quality service delivery?
 - Can we scale tasks into a traditional shared service center or other arrangement to save time and specialize support?

Leave Copy of Questions with Leadership After Initial Meetings

- To encourage further conversations and let academic leaders continue to ask direction and execution questions with internal stakeholders, leave behind a printed version of your key questions after the meeting is finished.
- See the appendix for a printable version of the “Five Questions” used by CIO Dr. Eric Denna at the **University of Maryland**.

Roadmap

1 The First 100 Day Challenge in Higher Ed

2 Navigating A New Campus

3 **Building The Foundation for Success**

4 Appendix

Contents

<i>Connecting with Central IT Staff</i>	Page 16
<i>Budgeting and IT Strategy in Higher Education</i>	Page 17
<i>Projects, Priorities, and Portfolio Management</i>	Page 18
<i>External Partnerships and Benchmarking</i>	Page 19
<i>Understanding the Shared Governance of IT</i>	Page 20
<i>Defending A Decentralized Institution</i>	Page 21
<i>Writing An Effective 100 Day Memo</i>	Page 22

Connecting with Central IT Staff

One of the new CIO's first priorities should be establishing personal relationships with key deputies, directors, project managers, and even line-level staff. If the central IT team does not understand the new CIO's vision and plans, or if the new CIO does not understand the challenges and culture unique to the institutional IT organization, it will be extremely difficult to make progress.

The CIO at **Ithaca College** recommends pre-wiring face-to-face conversations with a simple email, offering a basic biography and asking staff to fill out one of their own. Besides providing some personal details about individual staff that the CIO would not have known, the practice also pushes staff to think strategically about their professional development and role.

IT Staff Biography Email Template

- Template for pre-wiring conversations with team members.
- Page 30

One-on-One Conversations Precede Team Strategy



Meet In-Person with Maximum Number of Staff

- After starting work, begin scheduling time for half hour to one hour conversations with IT managers and line-level staff.
- Prioritize key deputies and managers, but when possible, include line-level staff to ensure that all levels of the team are heard and understood.



Ask About Personal and Professional Development Goals

- Conversations should include professional role information and skills, but also personal aspirations and development goals for the future.
- At **Ithaca College**, the CIO pre-wires these conversations with a brief biographical email; see the Appendix for a printable version of this tool.



Consult Individuals Before Team-Wide Meeting

- An 'all-hands' meeting that involves the entire IT department should not happen until the CIO has met with at least the key deputies and some lower-ranking staff.
- Putting individual conversations first ensures that strategy and goals will reflect on-the-ground realities, and that the new CIO is not too far ahead of team capabilities.



Consider Leadership Development and Succession

- Although the first 100 days represents the beginning of the CIO's tenure on campus, it is never too early to begin formally designating the skillsets and roles necessary for deputy and CIO succession.

See IT Forum Resources on Succession Planning

- Ingraining Succession Planning in Higher Education IT, the first white paper in the CIO Leadership Series, includes advice and tools to help identify knowledge and skill gaps in IT leaders, and begin developing the next generation of institutional IT managers.
- Visit www.eab.com/itf or contact your EAB dedicated advisor to learn more and access related publications and tools.

Budgeting and IT Strategy in Higher Education

Higher education IT organizations rely on a diverse range of funding models, from completely centralized authority to complex responsibility-centered management (RCM) arrangements. A new CIO will not be expected to create a new budget on the first day, but regardless of the period in the budget cycle when the CIO begins work, they should immediately learn about budgetary milestones, detail into costs, which purchasers to be aware of, and how budget transparency affects IT's relationship with end-users.

IT strategic planning focuses staff resources and time on the projects and initiatives that support the institution's key missions. Often, the same listening tours and exercises to define and align IT goals with these missions inform similar questions to those the new CIO should ask in the first 100 days. Ask for access to all of the working documents and deliverables from past IT strategic planning; these will help demonstrate priorities and establish a baseline for future planning cycles.

Situating the New CIO in IT Budgeting



Budget Cycle Entry

When does the budget period begin, and what are the relevant milestones and deadlines across the fiscal and academic year?

Granular Cost Detail

What are the major costs associated with IT on campus? Are allocations to capital, staffing, and operations comparable to peers?



Purchasing Authority

Who on campus can purchase new technology that IT should know about, and what mechanisms exist for IT to intervene or support purchasing activity?

Campus Transparency

How does IT communicate cost to departments and end-users? Do budget communications from IT allow departments to manage their demand effectively?



Take Advantage of Strategic Planning Activities



Records from Listening Tour

Did the previous IT leader maintain records on the needs of constituents? How do those records compare to current stakeholder needs?



Goals Cascade Discussions

How did teams connect IT projects and resources to institution-wide goals? What IT and institution goals remain unmet today?



Prioritization Decisions

Which criteria were used to prioritize goals in past planning cycles? Did governance partners and stakeholders agree with priorities?

See IT Forum Resources on Strategic Planning



- The IT Forum has created a webinar, draft plans, and other tools to help your team get started building a strategic plan.
- Visit www.eab.com/itf or contact your EAB dedicated advisor to learn more and access related publications and tools.

Projects, Priorities, and Portfolio Management

At a large institution, there may be dozens of ongoing IT projects at any given time, from small service changes that cost several thousand dollars to major technology implementations running into the tens of millions of dollars. A new CIO should not green-light or cancel many new projects in the first 100 days, and then only when necessitated by critical priorities or clear failures.

Rather than trying to understand the granular details of every ongoing project, the new CIO should begin with an overview of projects in progress that guides attention toward areas of concern and potential intervention (e.g., many projects falling behind schedule). At **Michigan State University**, the CIO asks for project counts related to schedule, project manager allocation, and functional areas, as well as how the count compares to the previous month. This allows the CIO to quickly understand trends and resource allocations in order to focus on projects that need support.

Project Checklist Template

- Template for quick overview of project status and trends
- Page 31

What the New CIO Needs to Know About IT Projects

General Status of Ongoing Projects



- What is the total number of active projects?
- How many projects are on track, behind schedule, and off track?
- How many projects are in an informal or pre-planning phase (e.g., discussions have occurred, but no resources allocated)?

Overview of Project Phases



- How many projects are in the initiation, planning, and execution phases?
- How many projects have been closed out since last month, and across the year?

Allocation of Project Managers



- How many projects have a project manager assigned, and how many do not?
- How many PMs are assigned to up to three projects, and how many are assigned more than three projects?
- What is the average and maximum number of projects per PM?

Share of Projects by Type and IT Function



- How many projects are assigned to each division within IT (e.g., Infrastructure, Service Management, Security, Teaching and Learning, Research Computing)?
- What types of projects are most prevalent (e.g., formal service request, collaborative initiative)?
- What size are current projects (e.g., up to 300 hours or three months of staff time versus 5,000 hours or over 12 months)?

Trends in Projects Month to Month



- For each of the metrics listed above, how has the count changed since the previous month?
- *Use simple trends (e.g., increasing, decreasing, remains the same) to quickly identify areas where the CIO should focus and consider active interventions.*

External Partnerships and Benchmarking

IT groups work with a diverse array of technical, strategic, and development vendors and partners to achieve local and institutional goals. It will take time for a new CIO to understand and gauge the value provided by partnerships; during the first 100 days, the new CIO should focus on identifying how external partners can facilitate critical tasks and knowledge-building that enables better relationships within campus.

In addition to feedback from conversations with internal leadership, IT staff, and external partners, the new CIO should consider formal assessments of service delivery quality and organizational maturity (e.g., TechQual+, EAB Functional Diagnostic, Core Data Service) . These data serve to corroborate the anecdotal opinions of end-users and enable focused remediation of critical problems; the data also provide new benchmarks and baselines to identify previously unknown gaps, and allow the IT department to make progress in a new area.

Assess and Evaluate Existing Relationships

- 1** *What Does the Partner Provide for the CIO?*
How does engagement with the external partner provide the CIO with unique best practices, networking, or strategic guidance?
- 2** *What Does the Partner Provide for IT Staff?*
What professional development and leadership opportunities does the engagement provide for key deputies and line-level staff members?
- 3** *Does the Relationship Fit into IT Strategy?*
Does the partner provide resources and advice that support the IT function's and broader institution's mission and goals?

Identify Gaps in Service and Maturity



Service Delivery Polling

- Use qualitative feedback, in-house polling, or managed services (e.g., TechQual+) to learn how end-users feel about the services provide by the IT function.



Maturity Benchmarks

- Self-score maturity against out-of-industry IT units (e.g., through CMMI) or against other higher education IT teams (e.g., EAB IT Functional Diagnostic, CDS).

EAB's IT Functional Diagnostic Benchmarks Key Capabilities

- The IT Forum has developed a new maturity and urgency diagnostic based on 29 key IT capabilities; fill out the survey to receive a custom benchmarking report and establish baselines for progress.
- Visit www.eab.com/itf or contact your EAB dedicated advisor to learn more and access related publications and tools.

Understanding the Shared Governance of IT

For an IT leader entering higher education from another industry, the shared governance model can be confusing and frustrating; instead of functional leaders controlling operations, a host of ostensibly unrelated stakeholders from across campus is allowed to have a say in internal affairs. However, the model is not without its benefits; shared governance makes higher education more democratic, risk averse, and community-oriented than many other industries.

During the first 100 days, a new CIO should not try to change governance models or overhaul processes; instead, learn as much as possible about the power-sharing arrangements, operational details, relationship status, and reporting needs relevant to each governance body. When launching new initiatives and working with institutional leaders, these are the groups that will either facilitate rapid and widespread buy-in or stymie progress; use the first 100 days to learn the structures and relationships that can guide effective forward progress.

What to Ask About Shared Governance Partners



What is the power-sharing arrangement between IT and the governance body?

- What kinds of budgeting, strategy, and operational issues does the governance group advise or have partial control over?
- What organizations (e.g., Faculty Senate, Alumni Affairs, Registrar) are represented within the governance group?



How does the partnership work on an operational level?

- How many times a year does the governance body meet, and what is the format of those meetings?
- How involved are IT managers and the CIO in governance deliberations?
- What is required of the IT team to make the governance group function effectively?



What is the nature of the relationship (professional and/or personal) between IT and the governance body?

- Has there been any conflict in the past that affected the relationship between the CIO or IT team and governance body?
- What was the cause of previous conflicts? How did previous IT leaders resolve issues and continue moving forward?



What data does IT need to provide to the governance body to support campus needs effectively?

- What are the reports that IT should provide to the governance body to support their decisions and strategy?
- Who is responsible for collecting and aggregating data that enters into these reports?
- Can any reports be automated to take the burden off of IT and partners?

Defending A Decentralized Institution

IT security is one of the fastest-growing challenges for higher education, and as data breaches and accidental exposures become a question of 'when' rather than 'if', pressure will continue to mount on the CIO and IT function to prevent and respond effectively to security incidents. While the technology side of cybersecurity involves many of the same tools and disciplines effective across industries, security awareness (i.e., end-user understanding of risks and behavior changes in response) in higher education presents distinct challenges that a new CIO needs to consider.

Defending a campus poses challenges including constantly changing end-users and devices, an academic community that rarely feels the consequences of risky behavior, and a leadership structure that lacks incentives to encourage secure behavior. Therefore, higher education CIOs must be creative; by rebranding training, cleverly demonstrating vulnerabilities tied to mission, and appealing to the carrot and stick financial incentives of administrators.

Unique Security Hurdles and Hidden Opportunities in the Higher Education Environment



Constantly Changing End-Users and Devices

- Each year, close to one quarter of students turn over and faculty and staff change, bringing new devices and no knowledge of institutional rules about security and data access.

▶ Rebrand Education As Amenity, Not Compliance Task

- Repurpose existing material as 'digital self-defense'
- Safer habits at home port back to campus activity



Academic Community Doesn't Feel At Risk

- Many faculty members and staff might not see the connection between their computer passwords and risks affecting the entire institution; risks are presented in the abstract rather than in currency that they value.

▶ Demonstrate Vulnerability through Vivid Examples

- Share monitoring and auditing data on real weaknesses
- Show end-users the tangible things they could lose



Leaders Not Incented to Improve Security

- Academic leaders and line staff do not feel financial or operational penalties of breach events, nor do they see the benefits of improving security as related to unit mission.

▶ Appeal to "Carrot and Stick" Financial Levers

- For egregious incidents, charge units to get attention
- Appeal to reduced costs, space reclamation through centralization of unsecure department technology



See IT Forum Resources on Elevating Security Awareness

- In our 2014-2015 research cycle, the IT Forum profiled best practices in elevating security awareness training and education.
- Visit www.eab.com/itf or contact your EAB dedicated advisor to learn more and access related publications and tools.

Bringing It All Together

At the conclusion of the 100 days, it is time to execute on the key campus and IT priorities identified and explored over the previous months. However, before moving forward, a memo to the IT department and campus describing the first 100 days and defining IT's goals can help a new CIO codify what they have learned and articulate their vision.

At **Pepperdine University**, the CIO found that a well-planned 100 Day Memo continues to serve strategic purpose well into his leadership tenure. Writing a memo that reiterates IT's alignment with institutional priorities, defines the scope of professional development for IT, outlines IT's partnerships inside and outside the institution, and sketches out the direction forward requires time and effort, but is a valuable tool to communicate the new CIO's plans and vision for years to come.

Writing An Effective 100 Day Memo



Reiterate IT Connection with Campus-Wide Priorities

- **Source:** Institutional and functional strategic plans, CIO listening tour, previous IT strategic planning exercises, and feedback from service polling or maturity gap analysis
- **Why it matters:** Align IT with the most important campus plans, and clearly explain to partners how IT will be involved



Outline Professional and Leadership Development Plans

- **Source:** Conversations with IT managers and line staff, informal or anecdotal feedback from campus about their relationship with IT, and feedback from maturity gap analysis tools
- **Why it matters:** Start building a team that can achieve the new CIO's goals; show the team how their development is tied to campus-wide progress and change



Define Range of Internal and External Partnerships

- **Source:** CIO listening tour conversations and recommendations from leadership, existing relationships with external vendors, organizations, and partners
- **Why it matters:** Reaffirm partnerships that create value, and explain how a new relationship could bring new benefits to the team and the institution



Lay Out Concrete Goals and Measures of Success

- **Source:** Summary of goals and initiatives derived from formal and anecdotal sources, prioritized by alignment to key campus issues and strategic development goals
- **Why it matters:** Make the 100 Day Memo a long-term tool by describing tangible goals and setting metrics for success; use the Memo's metrics and goals to begin formal strategic planning



Communicating the Direction Forward

"Your first 100 days is when you start to identify the root cause problems on campus and pinpoint the opportunities for IT to support campus development. A 100 Day memo codifies that organizational knowledge and goal-setting into a single, strategic document."

*Jonathan See, CIO
Pepperdine University*

Roadmap

1 The First 100 Day Challenge in Higher Ed

2 Navigating A New Campus

3 Building The Foundation for Success

4 Appendix

Contents

<i>Tool #1: Higher Education Background Primer</i>	Page 24
<i>Tool #2: Listening Tour Checklist</i>	Page 28
<i>Tool #3: "Five Questions" Drop Sheet</i>	Page 29
<i>Tool #4: IT Staff Biography Hand-Off Template</i>	Page 30
<i>Tool #5: Project Status Template</i>	Page 31

Tool #1: Higher Education Primer

Non-Profit Organizations & Professional Associations in Higher Education

Acronym	Description	Web Link
AACC	American Association of Community Colleges	http://www.aacc.nche.edu
AACRAO	American Association of Collegiate Registrars & Admissions Officers	http://www.aacrao.org
AACU	Association of American Colleges and Universities	http://www.aacu.org
AASCU	American Association of State Colleges and Universities	http://www.aascu.org
AAU	Association of American Universities	www.aau.edu
AAUP	American Association of University Professors	http://www.aaup.org
AAUW	American Association of University Women	http://www.aauw.org
ACE	American Council on Education	www.acenet.edu
ACTA	American Council of Trustees and Alumni	http://www.goacta.org
ACCT	Association of Community College Trustees	http://www.acct.org
AERA	American Educational Research Association	http://www.aera.net
AFT	American Federation of Teachers	http://www.aft.org
AGB	Association of Governing Boards of Universities and Colleges	http://agb.org
AIR	American Institutes for Research	http://www.air.org
APLU	Association of Public and Land-Grant Universities	http://www.nasulgc.org
APSCU	Association of Private Sector Colleges and Universities	http://www.career.org
CAE	Council for Aid to Education	http://www.cae.org
CASE	Council for Advancement and Support of Education	www.case.org
CAS	Council for the Advancement of Standards in Higher Education	http://www.cas.edu
CCCU	Council for Christian Colleges & Universities	http://www.cccu.org
CIC	Council of Independent Colleges	http://www.cic.edu
COE	Council for Opportunity in Education	http://www.coenet.us
EFC	Education Finance Council	http://www.efc.org
EDUCAUSE	EDUCAUSE	http://www.educause.edu
ETS	Educational Testing Service	http://www.ets.org
HACU	Hispanic Association of Colleges & Universities	http://www.hacu.net
IAU	International Association of Universities	http://www.iau-aiu.net

Tool #1: Higher Education Primer (Continued)

Non-Profit Organizations & Professional Associations in Higher Education

Acronym	Description	Web Link
NACAC	National Association for College Admission Counseling	http://www.nacacnet.org
NACUBO	National Association of College and University Business Officers	http://www.nacubo.org
NEA	National Education Association	http://www.nea.org
NAFEO	National Association for Equal Opportunity in Higher Education	http://www.nafeo.org
NAICU	National Association of Independent Colleges and Universities	http://www.naicu.edu
NASPA	National Association of Student Personnel Administrators	http://www.naspa.org
TICAS	The Institute for College Access & Success	http://www.ticas.org
UPCEA	University Professional and Continuing Education Association	http://www.upcea.edu

Commonly Used Acronyms in Higher Education

Acronym	Description
ACT	American College Testing (<i>no longer abbreviation</i>)
AP	Advanced Placement
BCP	Budget Change Proposal
BCSSE	Beginning College Survey of Student Engagement
CAPP	Curriculum Advising & Program Planning
CCD	Community College District
CE/CEU	Continuing Education/Continuing Education Unit
DoED	Department of Education
ECHS	Early College High School
ELL	English Language Learner
ESL	English as a Second Language
FAFSA	Free Application for Federal Student Aid
FARS	Financial Aid Reporting System
FERPA	Family Education Rights Privacy Act
FIS	Faculty Information System

Tool #1: Higher Education Primer (Continued)

Commonly Used Acronyms in Higher Education

Acronym	Definition
FSSE	Faculty Survey of Student Engagement
FTE	Full-Time Equivalent (Enrollment)
GE/GER/Gen-Ed	General Education Requirements
HBCU	Historically Black Colleges & Universities
HEA	Higher Education Act
HSGPA	High School Grade Point Average
IPEDS	Integrated Postsecondary Education Data System
IR/IRP	Institutional Research/Institutional Research & Planning
LBO	Legislative Budget Office
LEA	Local Education Agency
LEP	Limited English Proficiency
NCES	National Center for Education Statistics
NSSE	National Survey of Student Engagement
OCR	Office of Civil Rights
RCM	Responsibility Center Management
SAC	Student Advisory Council
SAT	Scholastic Achievement Test (<i>no longer abbreviation</i>)
SGA	Student Government Association
SIRS	Student Information Reporting System
SIS	Student Information System
SOS	Student Opinion Survey – Student Satisfaction (by ACT)
SSI	Student Satisfaction Inventory (by Noel-Levitz)
TOEFL	Test of English as a Foreign Language

Tool #1: Higher Education Primer (Continued)

Job Title Acronyms in Higher Education

Acronym	Description
AAO	Affirmative Action Officer
BOG	Board of Governors
BOR	Board of Regents
BOT	Board of Trustees
CAO	Chief Academic Officer/Chief Advancement Officer
CBO	Chief Business Officer
CDO	Chief Development Officer
CEO	Chief Executive Officer
CHRO	Chief Human Resources Officer
CSSO	Chief Student Services Officer
FAO	Financial Aid Officer
VPSA	Vice President (or Provost) for Student Affairs

Media Outlets in Higher Education

Media Outlet	Web Link
<i>American Federation of Teachers</i>	http://aft.org/newspubs
<i>American School & University</i>	http://asumag.com
<i>Diverse: Issues in Higher Education</i>	http://diverseeducation.com
<i>Education Week</i>	http://www.edweek.org
<i>Inside Higher Ed</i>	http://www.insidehighered.com
<i>The Chronicle of Higher Education</i>	http://chronicle.com
<i>New York Times, Education Section</i>	http://www.nytimes.com/pages/education
<i>EAB Daily Briefing</i>	http://www.eab.com/daily-briefing
<i>NPR, Education Section</i>	http://www.npr.org/sections/education
<i>Campus Technology</i>	http://campustechnology.com/Home.aspx
<i>Education Dive</i>	http://www.educationdive.com/
<i>University Business</i>	http://www.universitybusiness.com/topic/technology
<i>Ed Tech Magazine</i>	http://www.edtechmagazine.com/higher/

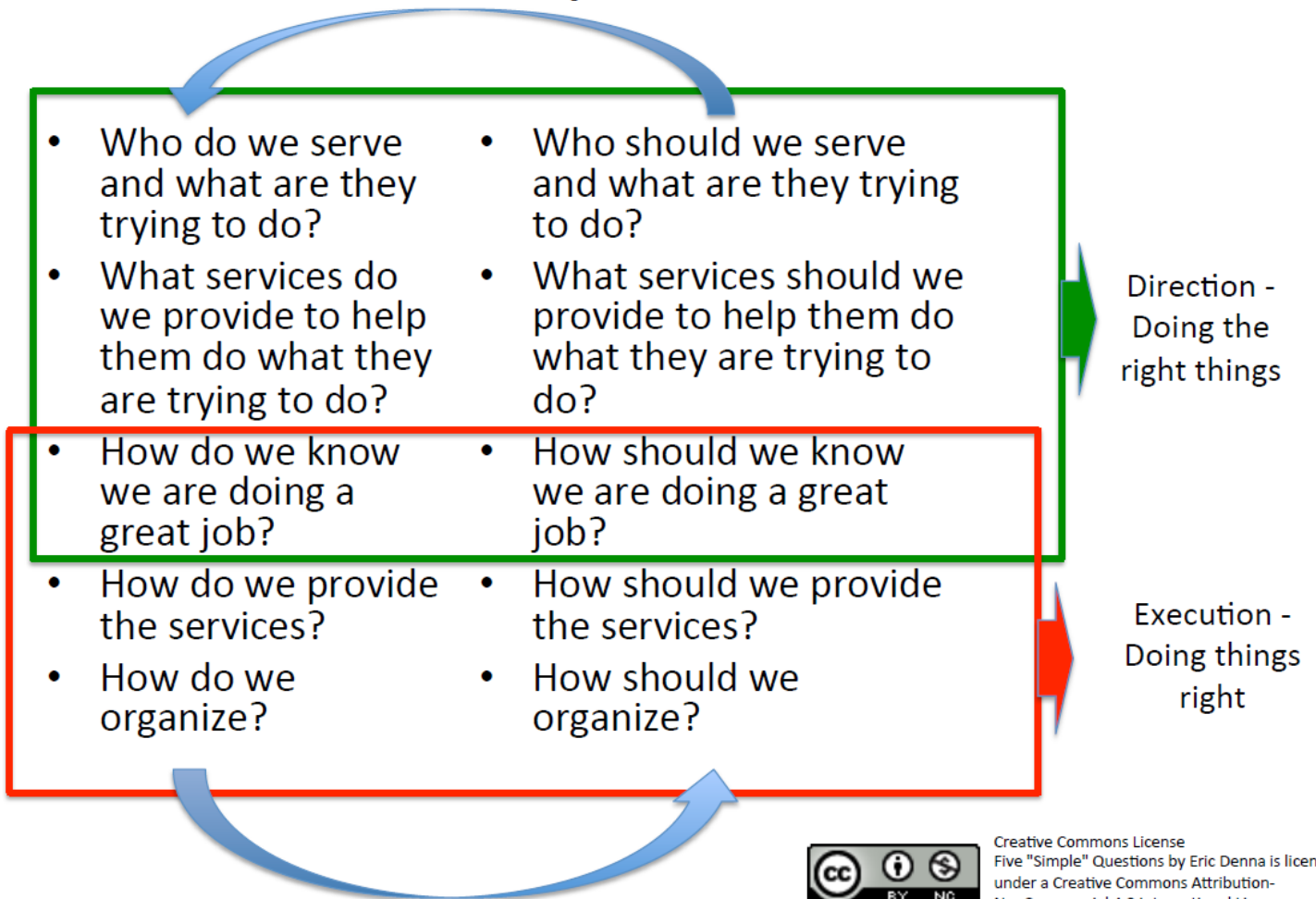
Tool #2: Listening Tour Checklist

	Constituent Category	Contact Title	Major Initiatives Identified?	Meeting Date	Meeting Complete?
<i>To be augmented after discussions with IT team and study of org charts</i>	Institutional Leaders	President			
		Provost			
		President/Provost Chiefs of Staff			
		Chief Business Officer			
		Chief Financial Officer			
		Chief Operating Officer			
		Chief Advancement Officer			
		Head of Student Affairs			
		Dean of Continuing and Online Education			
		Head of Facilities			
		Head of Research Administration			
		Faculty Senate Leadership			
		Dean's Council Members			
		Board of Trustees IT Group			
<i>To be augmented after identifying largest tech users and discussions with IT team</i>	Key IT Partners	Institutional Research			
		College IT Directors			
		IT Governance Group Leaders			
		Registrar			
		Procurement Director			
		Admissions Director			
		Enrollment Director			
		Alumni Affairs Director			
		Director of Athletics			
		Deans of Engineering, Computer Science Schools			
<i>To be filled in as discussions with leaders and IT partners identify most influential campus constituents</i>	Academic 'Influencers'				

Tool #3: “Five Questions” Drop Sheet

Institution: University of Maryland at College Park

Five “Simple” Questions



Tool #4: IT Staff Biography Hand-Off Template

Institution: Ithaca College

Team,

Good morning! Please edit the information below and send it to me via a separate mail by (Date, Month, Year). This will give me an opportunity to get to know you better. I've included some brief instructions for filling it out. I've also included a copy of one for me as an example. Feel free to shoot me an e-mail if you have any questions.

Thank you!

PROFESSIONAL BIO FOR: First Name & Last Name (NOTE: also include as subject of e-mail)

NICKNAME/GO BY NAME: How would you want me to refer to you?

POSITION/TITLE: Current position/title

JOB DESCRIPTION: Please provide your official job description if you know it. If not, please do your best to describe what it is you do for X University.

OF YEARS IN CURRENT POSITION: Self Explanatory

OF YEARS AT X University: Self Explanatory

SKILLS: Please describe your skills and expertise by completing the following sentences "*My top five skills are, (blank)*" and "*The one thing I'm most proficient in is (blank)*" "

PROFESSIONAL BACKGROUND: Please provide a summary of your past employment experiences (last three positions held)

EDUCATION/TRAINING: Please include bullet points to denote continuing education, seminars, professional enrichment workshops and major conferences related to higher education or information technology.

COMMUNITY INVOLVEMENT: List your community volunteer activities here.

GOALS: Please write down your professional goals and what you hope to contribute to X University.

OTHER: Please include anything else you would like to share with me which hasn't already been covered. Feel free to include questions or suggestions for me in my role and how I can help you be successful, help the team, and help our institution.

Tool #5: Project Status Overview Template

Institution: Michigan State University

Project Status Overview

IT Function	Active Projects	Green ↑	Yellow →	Red ↓	Planned Projects
<div style="background-color: #444; color: white; padding: 10px; border: 1px solid black; width: fit-content; margin: 0 auto;"> Populate each cell with a count of distinct projects within the IT function and status constraints. </div>					
All Functions					
Communications					
Content Development					
Infrastructure					
Systems					
Teaching and Learning					
Other					

Service Provider Trends

Service Provider	#	
IT Only		↑
Consultants Only		→
Shared		↓

Project Phase Trends

Phase	#	
Initiation/Planning		↑
Execution		→
Closed Out		↓

Project Size Trends

Project Size	#	
Small		↑
Medium		→
Large		↓
Very Large		↑

Project Manager Trends

PM Assigned?	#	
Yes		↑
No		→
Average per PM		↓
Maximum per PM		↑

Legend

<p>Green....On track, few issues</p> <p>Yellow...Behind schedule, some issues</p> <p>Red.....Off track, major issues</p>	<p>Small.....< 3 months / 300 hours</p> <p>Medium.....3-6 / 300-1,000</p> <p>Large.....6-12 / 1,000-5,000</p> <p>Very Large.. >12 / >5,000</p>
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